

# Enrollment Process

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# Enrollment periods

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- Enrollment begins May 2004
- Beneficiaries not already enrolled in a drug card may apply at any time
- Current card enrollees may make a change during the annual election period (November 15, 2004 – December 31, 2004) for January 1, 2005.

# Effective date

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- Annual Election Period (Nov 15, 2004 – Dec 31, 2004):
  - Enrollment effective January 1, 2005
- All other enrollments effective 1<sup>st</sup> of the month following the month of receipt

# Enrollment Form

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- 2 model/standard enrollment forms:
  - Discount Card only
  - or-
  - Discount Card **and** \$600 (Transitional Assistance)
- You may customize, but must include all elements
- Beneficiary submits completed form to card sponsor

# Enrollment Form continued

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- Sponsor reviews application forms for completeness and screens each form
- If a form is incomplete contact the beneficiary to obtain information or return if necessary
- Forms that indicate ineligibility are not processed but a notice of ineligibility must be sent to the beneficiary

# Alternatives to forms

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- For discount card only
  - Telephone
  - Internet
    - May make TA enrollment forms available for printing on your web site
- All Transitional Assistance enrollments require a signed form

# Submit Transactions

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- Submit enrollment transactions to CMS
- CMS reply
- Reply to beneficiaries based on CMS response to each transaction

# Notices

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- Eligible (confirmation) notices
  - Tell the beneficiary s/he's enrolled and provide effective date
  - Send ID card, handbook, etc.
  
- Ineligibility determination notices
  - Inform of CMS's determination of ineligibility; provide information about reconsideration
  - Individual's ineligible for TA may re-apply for the discount card (if eligible)

# Reconsideration

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- Beneficiaries found ineligible for either the drug card or the drug card with the \$600 can request a reconsideration
- Independent reconsideration entity will obtain additional information and make a final determination

# Reconsideration continued

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- Sponsor will be notified if eligibility approved
- Reconsideration entity will notify beneficiary when eligibility is not approved

# Enrollment Fee

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- If a fee is charged, it may be collected with the enrollment form, or billed after at sponsor discretion (discount card only)
- Do not collect a fee from beneficiaries applying for the \$600

# Continuing enrollment

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- Beneficiaries remain enrolled unless they choose to disenroll, change cards (when allowable), or are disenrolled
- Drug card only (no \$600) are automatically charged any enrollment fee for the next year

# Disenrollment

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- Beneficiaries may disenroll at any time, however, unless a special election period applies
  - they may not enroll again until the annual election period
  - forfeit any remaining portions of \$600 for that year

# Special Election Periods

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- Move outside of current drug card's service area
- Change residence to or from a SNF and nursing facilities
- Enrolls in, or disenrolls from a Medicare Managed Care plan
- Current card terminates

# Non-payment of Annual Fee

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- Enrollees (discount card only) who do not pay any required annual fee may be disenrolled
- Notify within 20 days of delinquency
- If still unpaid in 10 days; disenroll
- Submit disenrollment to CMS and notify beneficiary that membership has ended

